



Nomination of beneficiary

1. Fund and member details (must be completed)

Fund name

Account number (if known)

Member name

2. Beneficiary details (must be completed)

Please read the 'Important notice for beneficiary nominations' at the end of this form before you complete this section.

If you want all or part of the benefit to be paid to your estate (and distributed in accordance with your Will) you should write 'Legal Personal Representative' in the row headed 'Name' and write the relevant percentage in 'allocation (%)'.

If you have selected a reversionary pension in section 4 of the application form, binding nominations are not available to you.

Beneficiary nomination type (please select one only)

☐

Binding **OR**

☐

Non-binding

Beneficiary 1

Name

Relationship to me

allocation (%)

date of birth

 / /

Beneficiary 2

Name

Relationship to me

allocation (%)

date of birth

 / /

Beneficiary 3

Name

Relationship to me

allocation (%)

Date of birth

Beneficiary 4

Name

Relationship to me

allocation (%)

Date of birth

Total**100%****3. Declaration by member (must be completed)**

I direct the Trustee to distribute the benefit payable in respect of me in the event of my death in accordance with this form. This nomination form supersedes any previous nomination of beneficiary.

I acknowledge that I have read the binding nomination rules below, and that my nomination complies with these requirements.

Signature of member

Date

4. Declaration by witnesses (binding nomination only)

We, the undersigned, declare that we are at least 18 years of age and that this notice was signed by the member in our presence. (Please ensure that the date each of the witnesses signs this form is the same date as the member signs, otherwise this nomination will not be valid.)

Witness 1

Name

Address

Suburb

State

Postcode

Signature of witness 1

Date

Witness 2

Name

Address

Suburb

State

Postcode

Signature of witness 2

Date

/

/

Important notice for beneficiary nominations

For the purpose of paying a death benefit, a dependant includes:

- a person who is financially dependent upon you at the date of death
- a child, adopted child, step-child, ex-nuptial child or
- a spouse (including a de facto or same sex spouse) or
- a person with whom you have a close personal relationship and share a residence with and one or each of you provides the other with financial support, domestic support and personal care.

A dependant is also a person with whom you have a close personal relationship, but the other requirements detailed above aren't satisfied because either or both of you suffer from a physical, intellectual or psychiatric disability.

Important notice for binding nominations

In order to be effective, a binding nomination must be signed by two (2) witnesses who are at least 18 years old and who are not named in this nomination form. Also, in order to have effect this form must be received by the Trustee.

You may only nominate dependants or legal personal representatives.

A binding nomination is effective for three (3) years after the day it was first signed, or last confirmed or amended by the member. If you wish to confirm your nomination (to avoid it ceasing to have effect after three (3) years) you may do so by providing a new binding death benefit dependant nomination form to that effect to the Trustee.

Your binding nomination will also cease to have effect if you subsequently marry, remarry or divorce.

If you wish to amend or revoke your binding nomination you may do so by providing a notice to that effect to the Trustee witnessed in the same manner as your original nomination (by two (2) persons over the age of 18 years who are not named in the nomination form). We will provide a form for this purpose upon request.

If a beneficiary nominated to receive a benefit predeceases the member or if a person nominated below is not a dependant or legal personal representative at the time of death, that person's benefit will be distributed equally amongst the surviving nominated dependants or nominated legal personal representative. If there are no surviving nominated dependants or nominated legal personal representative the benefit will be paid in accordance with the Trustee's discretion.

You must provide all details requested in this form. If you do not, the Trustee may need to contact you to obtain further information. In the absence of certain information, the rules governing binding nominations adopted by the Trustee provide for the following:

- If you fail to specify an allocation, the benefit will be distributed equally amongst those persons nominated who are eligible to receive a benefit. If you do nominate allocations in respect of all nominated persons but the sum of the allocations is other than 100%, the allocations will be adjusted proportionately.
- If you specify an allocation in respect of some but not all of the nominated persons the residual amount will be distributed equally amongst those nominated persons in respect of whom no allocation is specified. In the event there is no residual amount, no benefit will be paid to those persons in respect of whom no allocation is specified.